Core Managers: Managing Service Request Workflow & Billing

Questions? Contact VUMCcores@vumc.org
Service Requests

Cores utilizing the iLab Service Project Workflow functionality should reference this guide on full system behavior and procedures.

Requesting Services

Customers should submit a request for service by opening the core’s iLab site and navigating to the Request Services Tab.

1. On the Request Services page, there will be a list of available services.
   a. Click on the Request button to the right of the service you would like to request.
2. Select the user by entering the name of the person for which you wish to make the request and click the Proceed button.
   a. Note: Make sure you are searching within “this institution” or “all” if you are looking for a user that has not yet used the core.
3. Complete the submission form. All required fields marked by a red star.
4. In the payment information section, select the billing number from the drop-down menu.
   a. If you do not know the payment number, do not select a billing number from the drop-down menu. The core user will be able to update the request with the correct billing information.
   b. Split Charge: The cost-of-service requests can be allocated across billing numbers.
      i. To allocate across multiple billing number, click split charge.
      ii. Select the additional billing number from the drop-down menu.
      iii. Enter the % allocations to split the cost across the billing numbers.
   c. Billing number Notes: Lab members will need to be granted access to billing numbers by the PI and/or the Lab Manager.
5. Submit the request. Once the request is submitted, the View All Requests tab will open to display the new request.

Cores may wish to submit a request on behalf of the customer:

1. When initiating the request, select the user by entering the customer’s name and click the Proceed button.
   a. Note: Make sure you are searching within “this institution” or “all” if you are looking for a user that has not yet used the core.
2. Complete form and select the payment information.
3. You may wish to route the request to the researcher for approval.
   a. If so, click the submit request to researcher button at the bottom of the page to submit the request.
      i. Once the request is submitted, the View All Requests tab will open to display the new request.
      ii. The status of the request will typically be Waiting for Researcher Approval indicating that the request owner needs to review the request to approve the proposed work and projected cost.
   b. If you wish to skip the approval process, check the Skip approval? option. Then click, submit request to researcher button to submit.
      i. Once the request is submitted, the View All Requests tab will open to display the new request.
      ii. The status of the request will typically be Waiting for Core to Begin.
Processing Service Requests

The core can view all new and active services requests on the View all Requests tab. The core should check this section iLab to approve and process any new service requests.

To review new requests:

1. All new service requests will be in the Waiting for Core to Agree status.
2. Click the blue arrow to expand the service request.
3. The details of the request are displayed. The following areas may be updated.

- **Item 1: Action icons.** These buttons allow you to update payment information (dollar sign icon), add a comment (text box icon), or print or cancel the request (pencil icon).

- **Item 2: Edit Overview** information, such as Project Description, Status, and Projected Cost.
- **Item 3: Update payment information** (functions same as the dollar sign icon).
- **Item 4: Add an attachment** or url.
- **Item 5: Add a note** to the history section.
- **Item 6: Edit Shipping Information.**
- **Item 7: Edit Billing Information.**
- **Item 8: Add a comment.** An email will be sent to notify designees copying the comment.
- **Item 9: Add/delete a form and view request details.**
To agree to request and provide a customer quote:

1. Review the form responses and Lock & Save Form.
   a. This is highly recommended – If the core does not lock the form, the customer may make changes and the core will not be notified.

2. Click add service to add services from the core’s service list to build the quote and calculate the project’s projected cost.

3. If there are multiple services available, you may choose to scroll down the list to locate the service of interest. Alternatively, you may start typing the service name in the search field to view a restrict set of services.
4. *Enter the unit quantity* and then click the *green plus button* to add the service.
   a. The service line item is added.

![Image showing the addition of a service line item and the agree button to approve the service request.]

5. Agree to the service request by clicking the *agree* button.

![Image showing the agree button highlighted for approval of the service request.]

6. **Create the quote.** Review the project cost, enter in the quote expiration date if applicable and indicate which items on the request you want included on the PDF quote.
   a. Check the box next to *include pdf quote*.
   b. Click on *submit* to send the PDF quote and link to the request in iLab in an email to the request owner.

![Quote creation interface](image)

7. When you click *submit* on the quote, an email will be generated and sent to the email addresses designated with a summary of the project and a quote included.

![Email notification](image)

8. The new information displays in the request and the request status is now *Waiting for Researcher to Agree*.
   a. **IMPORTANT:** The request will need to be approved by the customer before the core begins work.
To indicate that work has started on a request:

1. If the user and core have agreed to the work, and the Financial Approver has approved the projected cost and payment, work may begin on the request. The status of the request will be **Waiting for Core to Begin**.

2. Find the appropriate service request on **View All Requests**. Click the **Begin** button.

3. The process will update to **processing**.

4. Once the status is processing, core staff can add services, comments, milestones, attachments, and other items as they work on the project.
To mark a request as complete:

1. Once the work has been finished and the core is ready to bill, locate your service request on the View all Requests tab.

2. Click on the green complete button.

3. A confirmation message displays, and the status of the request is updated.

4. When a request is marked Complete all service items and milestones that have not been updated will update to Completed or Finished. Unless otherwise designated on the line item, the completed services will then be available for billing.
   a. Note, if you wish to leave the service project open, but bill for specific service items. Click Process and then Complete on the individual service line.
Historical Project Review

- All requests with a Completed status will be removed from your active requests list but can be searched for using filter options at the upper right of the request list table.
- Using the “View All Requests” tab is useful in researching billing disputes or reviewing previously completed projects.
- Click active requests to display these filter options.

Next Steps

- All charge lines completed via the project workflow process – will display as an option next time the core generates a billing event.
- Consult the iLab Core Manager User Guide for instructions on billing events, viewing invoices, refunds, and other system behavior.
Communicating with Customers

Cores can communicate directly with users within iLab. This feature allows all messages to be saved directly on the service requests and can be viewed at any time by the customer and the core.

1. The core can view and access all active requests on the View All Requests tab.
2. Click on the comment icon to the right of the request to use the communication tool.
   a. The email interface window will be displayed.
3. Complete the information and click send message.
   a. After you click on Send Message, the selected recipients will receive the email. An audit trail of the email exchange through iLab can be seen under comments on the request.